Chapter 4   Other Personnel Actions

✓ Process a Rehire (Former NAF Employees)

This procedure should be used to "rehire" when processing **former NAF employees**.
All of these former employees should already be in the HR system. You will be required
to enter the former employee's Personnel ID number.

This action uses the copy mode for several infotypes. It is important that you remember
the information that has defaulted in the fields pertains to a previous action and some
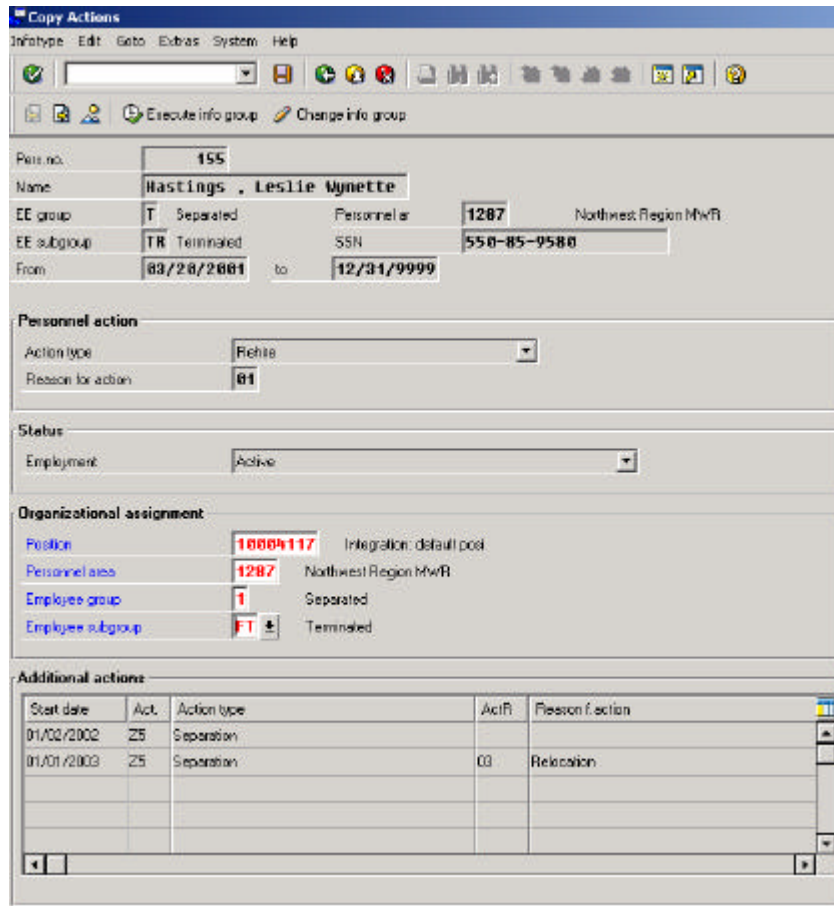fields may need to be changed to reflect the current action.

After you have entered your changes to an infotype and used the enter key, you should
receive a message telling you that a previous entry will be delimited. This verifies that
you want to make the change and that you previously have changed the "From Date" to
reflect that your record will now be the current record. You will proceed through the
message by using the Enter key and you will then be prompted to save your entries.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT >
ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

Press the Execute icon ⌚ and the Infotype 0000 - <u>Copy Actions</u> screen is shown.

We will make various changes to this screen and they are reflected in the screen shot above. We will validate the changes before we save the record. Here are the inputs that we have used.
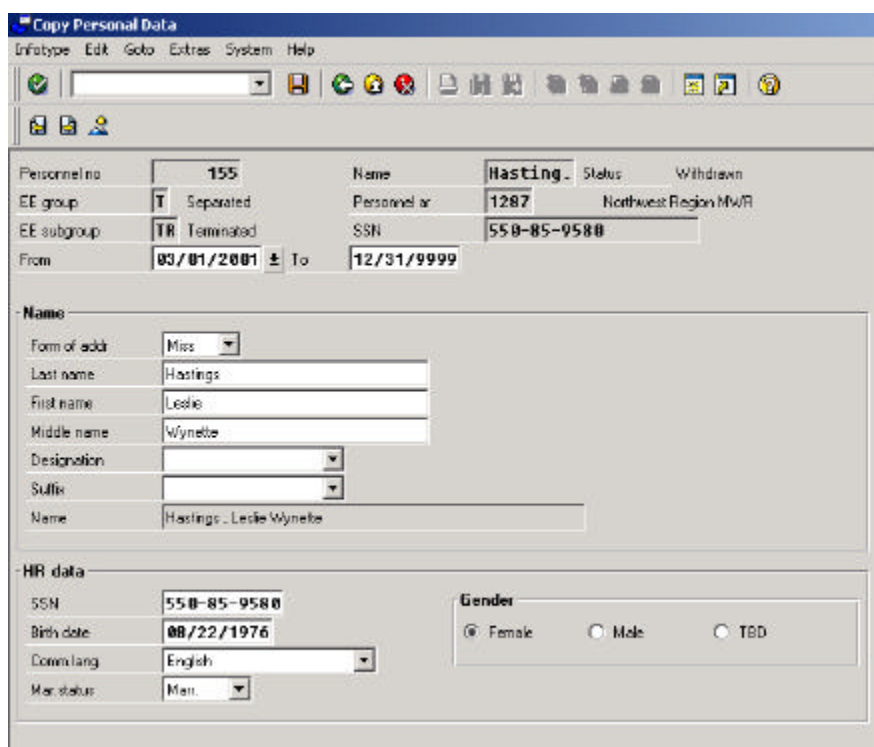
Field Name	Description	R/O/C	User Action/Values
Action type	Rehire	R	Will default in
Reason for action	The reason the action is being performed	R	You may enter the action directly or use the dropdown menu to select.
Employment	User defined	R	Field will default in Active
Position	User defined	R	Clear this field.
Personnel Area	The assigned area of the position within the organization	R	**Clear the field before selecting Will default from the position number selected**
Employee Group	The group that the employee will be assigned to	R	Clear the field before selecting Will default from the position number selected

Employee Subgroup	The assigned subgroup for the employee	R	**Clear the field before selecting Use drop down arrow to select.**

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the

Enter icon [icon] again. You will be warned to save your entries.

Press the Save icon [icon].

You will now see the next infotype in the rehire action series the Infotype 0002 – **Copy Personal Data**
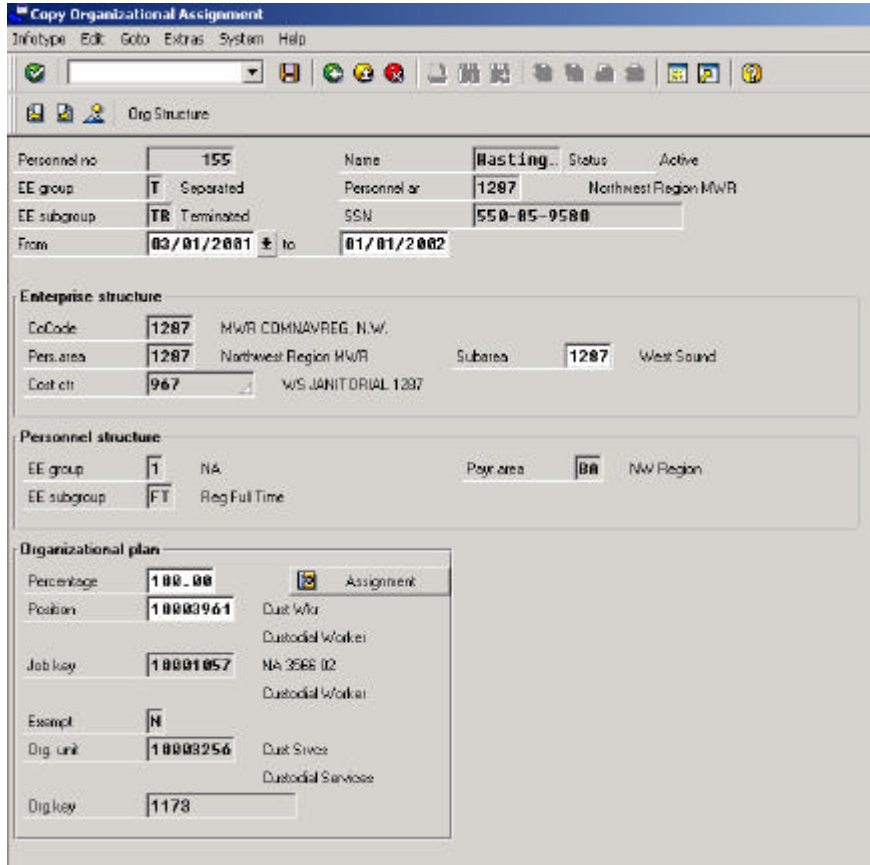

We have made no changes to infotype record so we validate the entries and save the

record by clicking on the Save icon [icon].

If there are any changes to any of these infotypes, make the changes and/or additions. If there are none and the information as stated on the infotype remains the same:

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the

Enter icon [icon] again. You will be warned to save your entries.

Press the Save icon ⊟ .

The next infotype is 0001 – **Copy** Organizational Assignment as shown below.

Validate all the entries on the screen and then: Press the Enter icon ✓ . You will get
the Record Delimited warning message. Press the Enter icon ✓ again. You will be
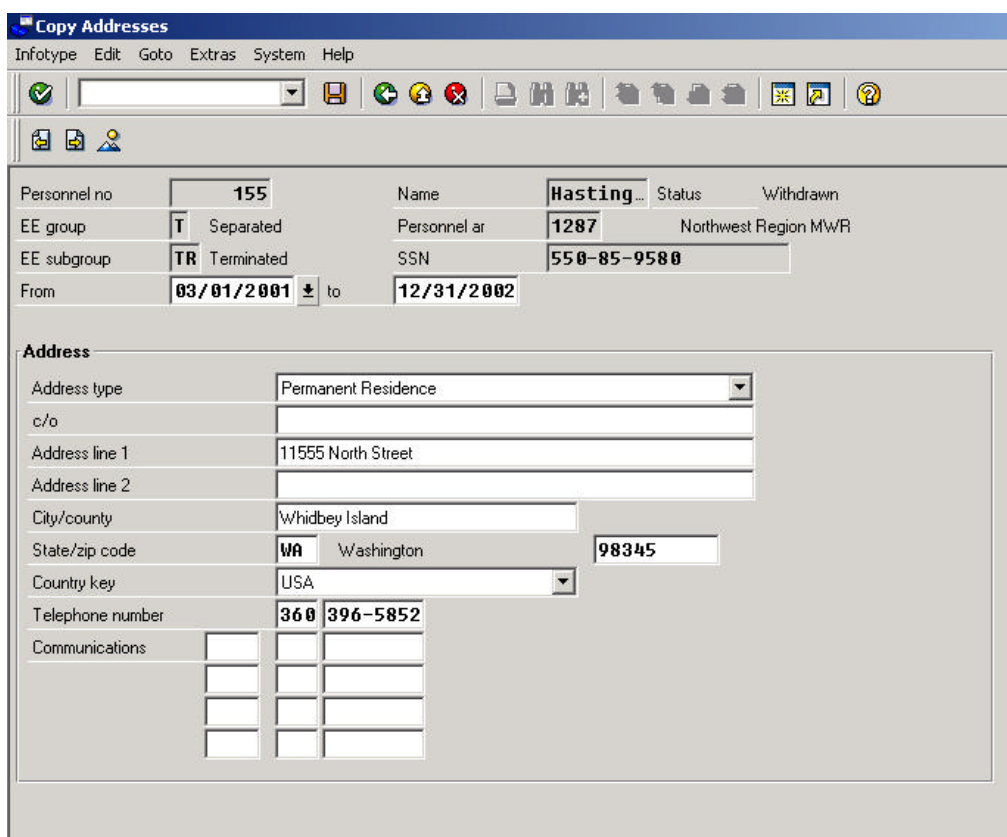warned to Save your entries.

Press the Save icon ⊟ .

As you go through the infotypes during the rehire process, validate the entries for accuracy, make the changes and/or additions as needed and:

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the Enter icon [icon] again. You will be warned to Save your entries.

Press the Save icon [icon].

The next infotype 0006 – Copy Addresses appears.

Again, there have been no changes in this information so we follow the same steps as before.

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the Enter icon [icon] again. You will be warned to save your entries.

Press the Save icon [icon].

The next screen to appear is the Tax Area. Always select the state of residence on this pop up window.

Double click on state name or click once, then select the green check [✓]. This populates the tax area field on the next screen, <u>Create Residence Tax Area</u>.

Press the Enter icon [✓]. You will get the Record Delimited warning message. Press the Enter icon [✓] again. You will be warned to Save your entries.

Press the Save icon [💾].

The Delimit Work Tax Area screen will appear. When you get to this screen, select the line with state of residence, click on the delimit icon . This saves the transaction.

Select , then the icon.

The next infotype Create Unemployment State appears.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to Save your entries.

Press the Save icon [icon].

We have received a new W4 from the rehired employee and must make the changes to infotype 0210 – Withholding Info W4/W5 US . In this case it is for the Federal Withholding as indicated on the screen.

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the Enter icon [icon] again. You will be warned to Save your entries.

Press the Save icon [icon].

The next infotype in the process of rehiring an employee appears on the next page.

This infotype 0041 – <u>Copy Date Specifications</u> shows the rehire date, requires no entry but must be saved.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to Save your entries.
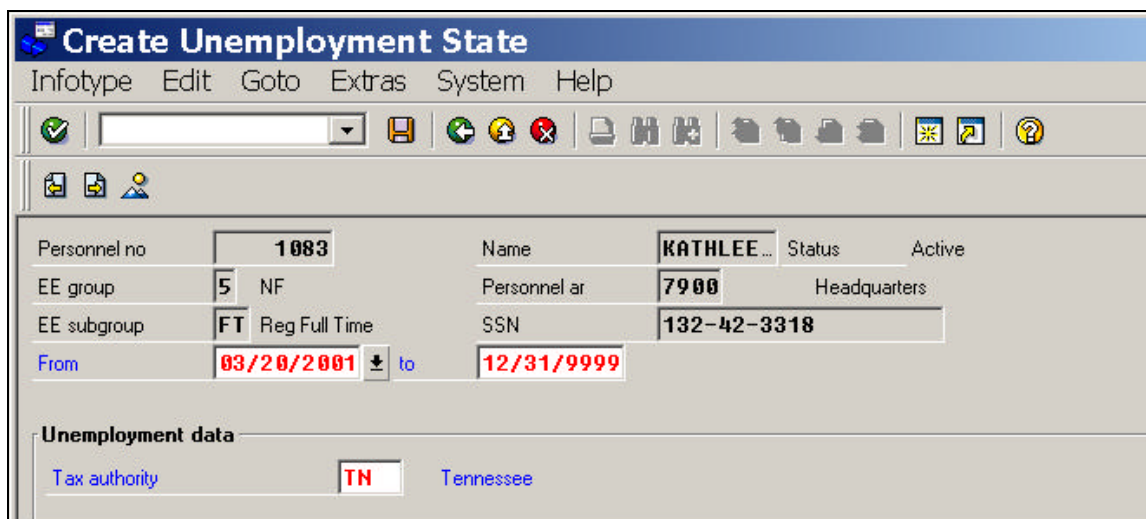Press the Save icon .

The next infotype is <u>Create Addresses – Unpaid Compensation.</u>

After making entries, press the Enter icon to validate. You will be warned to Save your entries.

Press the Save icon .

Validate entries by selecting , and save this screen.

The next screen is Copy Residence Status.

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the Enter icon [icon] again. You will be warned to Save your entries.

Press the Save icon [icon].

The next screen is Create Education. If no entries are necessary, click the [icon] icon. If education data is available, make entries in all required fields, and save your entries.

The next infotype to appear is the mandated DOD/MWR information type.

This is infotype 9001 – DOD/MWR Specific Data The completed infotype is shown on the next page.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to Save your entries.

Press the Save icon .

The next infotype in the process 0007 – <u>Copy Planned Working Time</u> appears

The only entry required was to pick the Work Schedule Rule. In the example it was **2002
– NF REG 30**

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the
Enter icon [icon] again. You will be warned to Save your entries.

Press the Save icon [icon].

We have filled in the fields required on this infotype 0008 – <u>Create Basic Pay</u>
We entered the group, the level and the hourly rate of pay.

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the
Enter icon [icon] again. You will be warned to Save your entries.

Press the Save icon [icon].

The next screen to appear is <u>Create General Benefits Information.</u>

This is another infotype 0171 – <u>Create General Benefits Information</u> that requires no entry, just validation of the information and saving it.

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the Enter icon [icon] again. You will be warned to Save your entries.

Press the Save icon [icon].

The final infotype to appear in the rehire process is infotype 0378 – Create Adjustment Reasons. This screen is shown here.

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the Enter icon [icon] again. You will be warned to Save your entries.

Press the Save icon [icon].

The process is complete and this can be verified by using transaction code PA30 to inspect all the infotypes processed during the rehire.

Print a Personnel Action Report, and continue processing rehire with Creating Benefit Enrollment.

☑ Process a Multiple Position Assignment

This procedure will cover the necessary steps to process an employee's record that, because of circumstances, has been assigned to two positions. This is not a common situation but it does occasionally occur at smaller operations where people are "double-hatted". **This process is for Flexible employees and rehired retirees coming back as flexible**.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

For our example of processing an employee that is being assigned to two positions, we are using Angela Brown from NAVSTA, Mayport.

Field Name	Description	R/O/C	User Action/Values
Personnel Number	The individual Personnel Number assigned to each employee	R	Enter the Personnel number, if known, or use the dropdown menu to select.
From	The FROM date	R	Enter the beginning date of the multiple position assignment.
Action Type	The types of action that can be performed	R	Select the Multiple Position action line to highlight.

Select the Execute icon

The screen will roll to infotype 0000 – <u>Copy Actions</u>

Inputs for the screen shown on the previous page.

Field Name	Description	R/O/C	User Action/Values
Action type	Multiple Position	R	Will default from previous screen
Reason for action	The reason for the action being performed	R	Select the appropriate reason code for the Multiple Position Action using the dropdown menu.
Employment	User defined	R	Will default in. Cannot be changed
Position Number	User defined	R	**Blank out the position number in this field. Highlight and press Delete.**
Personnel Area	The assigned area of the organization of the position	R	Will default in and will represent the MWR location to which the original position has been assigned.
Employee Group	The group of employees that the employee will be assigned to.	R	Will default from the original position and represents the employment category, i.e. NF, NA, CC, etc.
Employee Subgroup	The assigned subgroup of the employee.	R	Leave the information as defaulted in. **This is for flexible employees and rehired retirees. If this is for a retiree, change employee subgroup to "RW."**

Press the Enter icon 🗹 . You will get the Record Delimited warning message. Press the

Enter icon 🗹 again. You will be warned to Save your entries.

Press the Save icon 🖫 to save the transaction and to open the next infotype record.

Infotype 0001 – <u>Copy Organizational Assignment</u> will show.

Field Name	Description	R/O/C	User Action/Values
Co Code	Company Code	R	Will default based on position
Pers Area	Personnel Area	R	Default in based on the entries made to the Infotype 0000 - <u>Actions</u>.
Cost Ctr	Cost Center	R	Will default blank and will be populated after the multiple positions are created.
Subarea	Personnel area	R	Default in based on the entries made to the Infotype 0000 - <u>Actions</u>..
EE Group	Employee Group	R	Default in based on the original entries made to the Infotype 0000 - <u>Actions</u>.
EE Subgroup	Employee Subgroup	R	Default in based on the original entries made to the Infotype 0000 - <u>Actions</u>.
Payr Area	Payroll Area	R	This field will default in.

Percentage	The percentage that the employee is assigned to the position number	R	This field will default to 100% **It must be blanked out!**
Assignment button	The percentage for each position	R	Allows for entering the % that the employee will be assigned to each position. **See note on next line.**
After checking the next four fields, Click the Assignment button to continue the action.			
Position Number	The position number	R	Default in blank based on the entries made to the Infotype 0000 - Actions.
Job key	Job key	R	Default in blank based on the entries made to the Infotype 0000 - Actions.
Exempt	Exempt status	R	Default in blank based on the entries made to the Infotype 0000 - Actions.
Org Unit	Organizational unit assigned	R	Default in blank based on the entries made to the Infotype 0000 - Actions.
Org key	Organization key assigned	R	Default in blank based on the entries made to the Infotype 0000 - Actions.

The window as shown above is one example of the Copy Organizational Assignment Action screen.
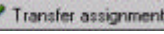
> NOTE: The first line in the window will show the current assignment and will be delimited. If this were a rehired retiree, both positions would be blank.

The first line with the current position will be grayed out. We now must correct the assignment to reflect the multiple positions. Re-enter position number, the 30 percent and the end date. For the multiple position, we need another line in the window to enter this information. Click the Insert Line button ▣ (the page with the plus sign on it) to add another line to the window. Enter **10004053** in the first field. Enter **70.00** in the percent field. Change the End date to **12/31/9999**.

If this were a rehired retiree, enter position number, percentage, and end date of 12/31/9999.

Click the Assign button [✓ Assign]. This puts the green check mark on the third row in the Operation column.

Click on the Transfer Assignment Icon [✓ Transfer assignment]. The system rolls back to the Copy Organizational Assignment infotype.

You will be prompted to create a vacancy for the original position (if there was one).

Save the transaction by clicking the SAVE icon [💾]. Notice that the Copy Organizational Assignment screen shows only one of the multiple positions.

The system will now show the 0008 – Create Basic Pay infotype.

We have entered the grade of the multiple positions and the Hourly rates (even though they are the same in this case). You will need to enter a reason code (choose one from the drop down menu) for multiple position group. **Do not use the code "20" as in the illustration. Always use the drop down arrow to find correct selection.**

Field Name	Description	R/O/C	User Action/Values
Reason Code	2 digit code	R	**Use drop down arrow to select reason code**
Group	Personnel group	R	**Must be original position group**
Wage type	Rate code	R	Enter 1013 for multiple position type

Press the Enter button. Press Enter again to validate the entries.

Press the Save icon [icon] to save the transaction. The employee is now created with Multiple Positions in the system. To verify, use transaction code PA20 <u>Display Master Data</u> to display this employee's master data. Highlight <u>Organizational Assignment</u>, then

select the [icon]. You will see the following message:
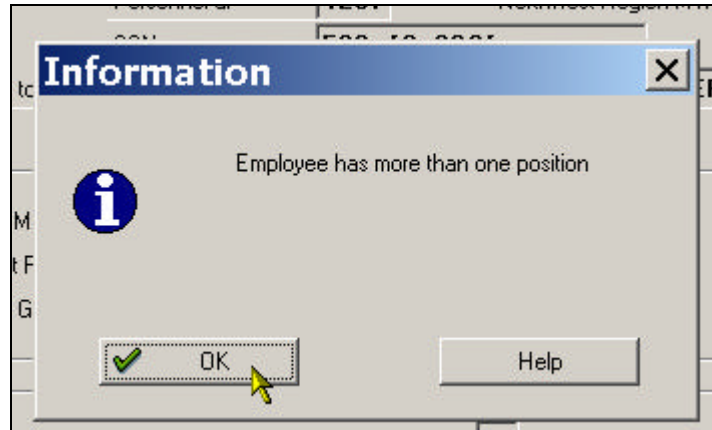
Click "ok" to close the message.

	NOTE: To view multiple positions, use PA20 to display HR Master Data, enter payroll number, select Organizational Assignment, and the [icon] **icon. Both positions will be displayed.**

> NOTE: Never put an end date to a record during the action. The end date should always be 12-31-9999.

✓ Process a Change in Position

This procedure describes the steps necessary to process a change in a position or a transfer through the SAP Human Resources system.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**
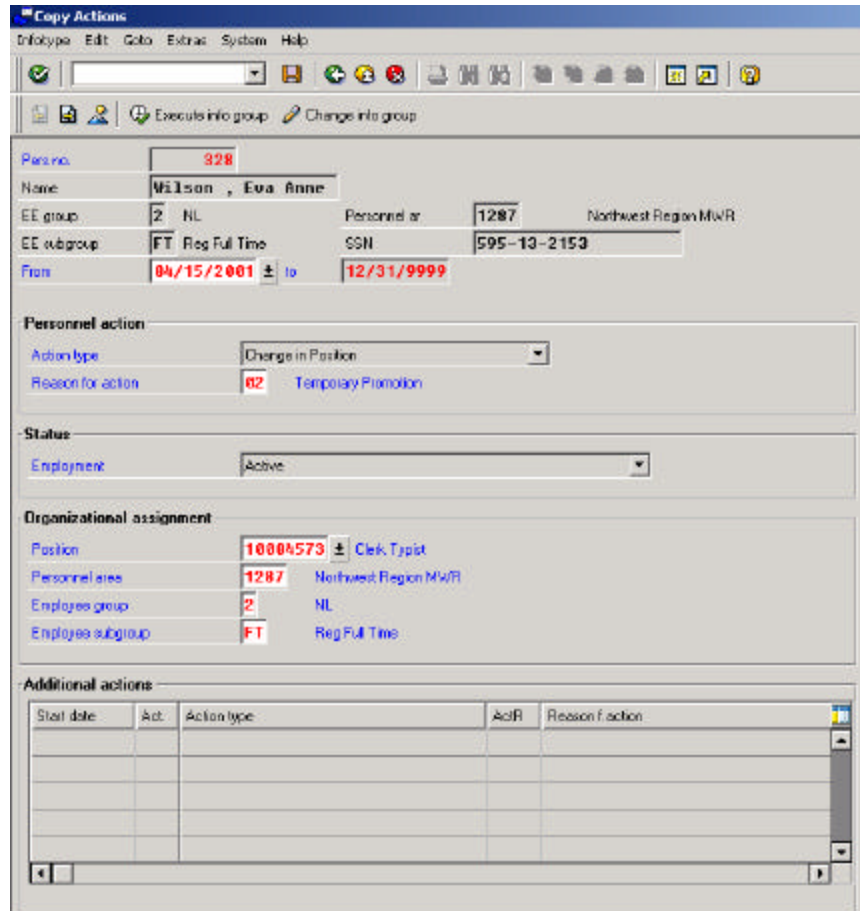
We have again chosen Personnel number 328, Ms. Eva Anne Wilson as the example of a change in Position / Transfer.

We have highlighted the Change in Position/Transfer line in the Action type section and we now click the Execute icon.

Field Name	Description	R/O/C	User Action/Values/Comments
Action type	Action type	R	Will default "**Change in Position**"
Reason for Action	The reason why the action is being taken	R	Enter the reason for the action using the drop down arrow to aid in selection. We are using **02 – Temporary Promotion**
Employment	In the Status section	R	Will default to Active and it is not available for editing
Position	The current position number	R	Must be blanked out! The new position number may be entered directly, if known or use the drop down arrow to aid in the selection.

Personnel Area	Will default from the previous position. **Blank it Out!**	R	Will default in the new Personnel Area upon pressing the Enter key after fields have been blanked out.
Employee Group	Will default from the previous position. **Blank it Out!**	R	Will default in the new Personnel Area upon pressing the Enter key after fields have been blanked out.
Employee Subgroup	Will default from the previous position. **Blank it Out!**	R	Use the drop down arrow to aid in selecting the correct employee subgroup.

NOTE: After striking the Enter key or clicking the green check mark, you will receive a message stating "W: Previous record will be delimited ", e.g., the end date of the last action will now be populated with the From date of the new action.

Press the Enter button or key to validate the entries after making sure they are correct.

Save the transaction by clicking the Save icon.

The infotype will be saved and the infotype 0001 – Copy Organizational Assignment will be called.

No Entry is required for this infotype.

Press the Enter button to validate the entries.

"W: Previous record will be delimited", (e.g., the end date of the last action will now be populated with the From date of the new action).

During the normal flow of this process, a pop-up window appears to create a vacancy for the employee's previous position. Click on the "**Yes**" button on this window.

Save the transaction by clicking the Save icon.

The infotype is saved and the next infotype 0006- <u>Create addresses</u> will show.

> **NOTE**: If the address information has changed due to the Change of position or transfer process, change the information on this infotype. If not, use the next
>
> record icon on the toolbar to forward to the next screen. The same instruction applies to all of the various tax infotypes as well. If the address changes, change the tax infotypes. If not, cancel through the records so the data will not be changed.

Select the "State of Delimitation" on the "Delimit Withholding" screen. by clicking on d the "Delimit" button. At this point, the activity transfer is complete. You may now proceed with the **Change in Position**.

There was no change in the address due to the change in Position. We just used the next record icon to move to the next of the applicable infotype records. In our example, the infotype 0008 – <u>Create Basic Pay</u> appears.

We have given Ms. Wilson a small adjustment in pay for the additional responsibility and we changed the Basic Hourly pay to 9.75 to reflect the change. We clicked the Enter

icon and now will click the Save icon to save the transaction.

NOTE: There were no changes in the taxes, so that tax infotypes **207 through 210** did not appear within the procedure. The steps required to change these infotypes are the same. Make the changes, press the enter key to validate and then save the transactions.

After saving this transaction, infotype 0019 – <u>Create Monitoring of Dates</u> will appear. This screen is shown on the next page.

The fields in this infotype are self explanatory and can be filled in directly or by using the drop down arrows to aid in selection. The task type, in our example, has been filled by using the drop down arrow and selecting **Detail – Temp Assign**. We have also entered the date the action becomes effective, and entered the processing indicator **New task**. We could also have used the Comments section to write in any free text remarks needed.

The system rolls to the next screen, "Copy General Benefits Information." No entries are needed but the dates must be verified and the transaction saved.

The final infotype to appear will be 0378 – <u>Adjustment reasons</u> as shown below.

The field "Adjustment Reason" will already be filled in based on the Position Change action. No entry is required.

Press the Enter key to validate the entries and then the Save icon .

Remember to select and to verify and save each of the infotypes where any changes have been made.

The final screen will show the message, "Record Created" and the process is then complete.

Follow instructions for Personnel Action Report.

If applicable, follow instructions for Benefit Termination or Enrollment.

✓ Process a Cash Award/Lump Sum Payment

This procedure describes the steps necessary to process a lump sum cash award through the SAP Human Resources system. Verify that you have all the approving documentation before starting the process. You will need a performance evaluation with two approving signatures and the award amount. **This process will be carried out at some time other than during the annual appraisal period**. The annual appraisal process also allows the awarding of a cash award.

Note: Email PAR to ADP payroll person for Cash Award Lump Sum

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTION**

Transaction Code: **PA40**

We have chosen Mr. Andrew Anderson to receive this lump sum cash award. We entered his personnel number directly into the field requesting the number.

Field Name	Description	R/O/C	User Action/Values
Personnel Number	Employee Number	R	May be entered directly or searched for using the drop down arrow.
From	The date of the lump sum payment	R	Enter the first date of the pay period that the amount is to be paid.
Highlight the Cash Award Action	This is an entry in the action type listing	R	There is a small box to the left of the text describing the action. Click on the box to highlight.

Click on the Execute button .

The cash award action has been started and the applicable infotype will appear as shown below.

The screen above shows only one field available for data entry. The small window shows the only acceptable entry, **O1 – Cash Award.** Click on the Green check mark icon on the window and the entry will be copied on to the infotype. Save the transaction and the next screen in the transaction series will show.
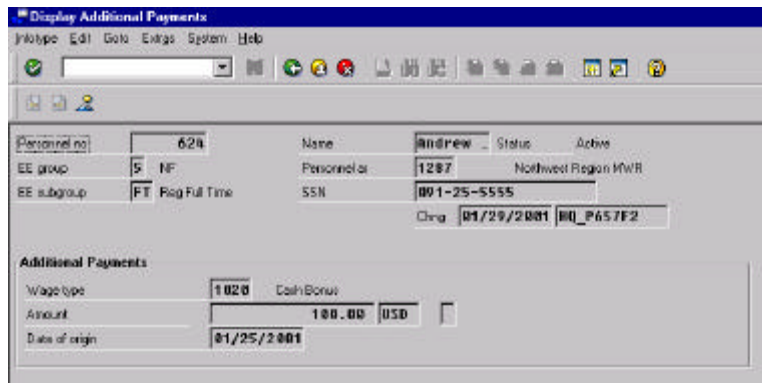
Field Name	Description	R/O/C	User Action/Values
Wage Type	Used for payroll processing	R	"1020" will default. Do NOT change.
Amount	Dollar amount of the cash bonus	R	Enter the amount of the bonus
Date of Origin	The date the amount is to be paid	R	Enter the first day of the pay period that the amount is to be paid.

Save the transaction by clicking the Save icon [icon]. The result is that the infotype 0015 – Additional Payments is created and the action is complete. A PAR will be created to show that the employee received a cash award. **Enter dollar amount of cash bonus in "Remarks" section of PAR before emailing to payroll**. **Review the instructions for emailing the PAR to payroll. Email PAR to ADP payroll person.**

☑ **Process the Annual Appraisal Documentation into SAP**

USE THIS PROCESS ONLY FOR ANNUAL APPRAISALS

This procedure describes the steps necessary to process the annual appraisal (Evaluation) documentation through the SAP Human Resources system. This process will be carried out during the annual appraisal period. The annual appraisal process allows the awarding of a cash bonus as well as an increase in pay to certain classes of employees. However, the key part of the appraisal process is to inform the employee and to document their progression toward becoming a more valuable part of the organization.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

We have picked the employee ready for his annual appraisal, Mr. Andrew Anderson, Personnel No. 624 by directly inputting the number, entered the first date of the pay period after the approving official signs and updates the appraisal and clicked the small box to the left of the text describing the action type, Annual Appraisal.

We now click the Execute icon to start the recording of the results of the appraisal.

In the Personnel Action section of the screen, we must enter the reason for the action using the drop down arrow to select "Annual Appraisal – 01"

Press the enter key [icon] to validate the entries and then click the Save icon [icon].

The infotype 0025 – <u>Create Appraisals</u> screen appears:

Field Name	Description	R/O/C	User Action/Values
Note: Due to conversion, all begin dates cannot be prior to conversion date. Otherwise, enter the actual from and to dates.			
From Date	The beginning date of the appraisal.	R	This date will default to the begin date of the action. It may be changed, if required. It cannot be prior to the conversion date.
To Date	The end date of the appraisal	R	Enter the end date of the appraisal, normally one year.
Appraisal Criterion	Value will default to 01	R	Will default to **01- Overall Appraisal**
Points	The score of the employee's appraisal	R	Enter the score from the appraisal form
Total Points	Will be calculated by the system	R	Will be calculated based on the Above entry after entering the screen
Name of Appraiser	Name of the appraiser	R	Enter the last names of the 1st and 2nd level appraisal officials
Appraisal Date	Date the appraisal was approved	R	Enter the date the employee signed the paper form

Press the Enter button or key to validate the entries.

Save the transaction by clicking the Save icon. [icon]. The system automatically rolls to infotype 19 – Monitoring of Dates.

Infotype 0019 – Create Monitoring of Dates

The information for task type and dates default from other infotypes. Select [icon] and save using [icon].

At this point in the process, there might be a change in the employee's basic pay for reasons outlined on the appraisal form so that it would be necessary to access infotype 0008 – Create Basic Pay to make any necessary changes. Use the next record icon to navigate through the infotypes.

Screen: 0008 – Create Basic Pay

In our example, there was NO adjustment to the Hourly rate of Pay. We made use the

next record icon to move to the next record. If you use the "next record" icon, a warning screen will appear with the message "Data will be lost." Select "yes" to continue.

Also, it might be necessary to make a one time payment or deduction to the Employee and we would have to access infotype 0015 – Create Additional Payments

Field Name	Description	R/O/C	User Action/Values
Wage type	Type of payment	R	Enter 1020 Cash Bonus or select using drop down arrow
Amount	Dollar amount	R	Enter dollar amount of payment
Date of origin	Date of payment	R	Defaults based on action date

This completes the actions needed for annual appraisal. If cash award is given, follow instructions for printing hard copy and emailing PAR.

✅ Process an Adjustment in an Employee's Pay

Note: Promotions are to be processed under Change in Position Action

This procedure describes the steps necessary to process an adjustment in pay through the SAP Human Resources system. Adjustments in pay are made for the following reasons:

ActR	Name of reason for action
01	New Pay schedule change
02	Change pay rate
03	COLA increase
04	Change in responsibility
05	Correction of an error

Be sure that you have all the appropriate, approved back-up documents, i.e., for merit increases, a performance evaluation with two levels of approval; for schedule changes, an approved pay schedule and the Commanding Officer's approval to give the pay increase, etc.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

HRV1 – February 2001

We have chosen the employee by directly entering the Personnel Number 162, Ms. Rebecca Royer, we have highlighted the action we wish to process "Adjustment in Pay" and we want this adjustment to be effective from the first day of the payroll period.

Click the Execute button

The resulting effect is to start the recording of the adjustment in Pay. The first screen, as shown below, is the Copy Actions infotype and the only entry allowed here is to enter the reason for the pay adjustment using the drop down arrow. For example, the reason is shown as 02 – Change Pay Rate.

Copy Actions

Press the Enter button ![enter] or Enter key to validate the entries. A warning message appears. Select the ![enter] to acknowledge the system message. Enter and save the transaction by clicking the Save icon. ![save]

Infotype 0000 is created and infotype 0008 – <u>Create Basic pay</u> will be shown.

<u>*Create Basic Pay*</u>

We have changed the Hourly rate of pay to 11.25 to reflect the Increase in pay

Field Name	Descriptions	R/O/C	User Action/Value
Reason	Reason for this change in the infotype	R	You may use the dropdown menu for your selections
Type	User defined	R	Will default in Navy MWR
Area	User defined	R	Will default in the area

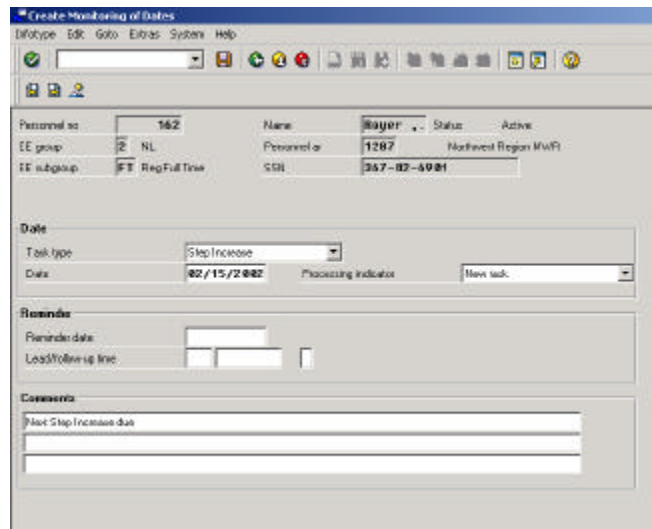| Group	User defined	R	Enter the employee's group using the drop down menu to select. User MUST verify for accuracy. .
Level	Level of Pay	R	Will default based on the entry in the group field. User MUST verify for accuracy.
Hourly Rate Wage types: 1010 = Hourly rate	Enter correct rates for each wage type listed	R	Enter the hourly rate(s) or have the rate(s) default if the annual salary field is populated. **Note: NA, NL, & NS groups will populate hourly rate. NF and CC wage rates must be entered.**
Annual Salary	Annual Salary	R	This field will default as no entry is allowed.
Capt util. Lvl	Used for Ansal calculation	R	The field defaults "100" Note: This field must NOT be changed.
Work/Hrs Period	Work hours in a period	R	This field will default in.

Press the Enter button [✓] or key to validate the entries. The system generates a warning message. Click [✓] to acknowledge the message.

Save the transaction by clicking the Save icon. [💾]

Infotype 0008 is validated and the next screen Infotype 0019 – <u>Monitoring of Dates</u> is put into the action.

We have entered the Task Type, which was the "**Step Increase**" type of task, "**New Task**" defaults Processing indicator and entered some comments regarding when the next step increase is due. If no entry is required, "right arrow" through this screen. Press the

Enter button or key, and save the transaction. The Adjustment in basic pay action is complete. Follow the for printing and/or emailing PAR.

☑ **Process a Step Increase**

Note: Promotions are to be processed under Change in Position Action

This procedure describes the steps necessary to process an adjustment in pay through the SAP Human Resources system. Adjustments in pay are made for the following reasons:

ActR	Name of reason for action
01	New Pay schedule change
02	Change pay rate
03	COLA increase
04	Change in responsibility
05	Correction of an error

Be sure that you have all the appropriate, approved back-up documents, i.e., for merit increases, a performance evaluation with two levels of approval; for schedule changes, an approved pay schedule and the Commanding Officer's approval to give the pay increase, etc.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

We have chosen the employee by directly entering the Personnel Number 162, Ms. Rebecca Royer, we have highlighted the action we wish to process "Adjustment in Pay" and we want this adjustment to be effective from the first day of the payroll period.

Click the Execute button

The resulting effect is to start the recording of the adjustment in Pay. The first screen, as shown below, is the Copy Actions infotype and the only entry allowed here is to enter the reason for the pay adjustment using the drop down arrow. For example, the reason is shown as 02 – Change Pay Rate.

<p align="center">Copy Actions</p>

Press the Enter button [icon] or Enter key to validate the entries. A warning message appears. Select the [icon] to acknowledge the system message. Enter and save the transaction by clicking the Save icon. [icon]

Infotype 0000 is created and infotype 0008 – <u>Create Basic pay</u> will be shown.

Create Basic Pay

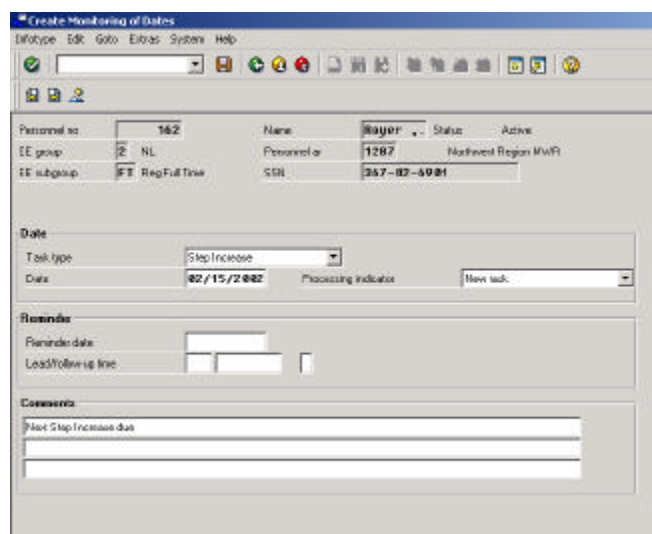We have changed the Hourly rate of pay to 11.25 to reflect the Increase in pay

Field Name	Descriptions	R/O/C	User Action/Value
Reason	Reason for this change in the infotype	R	You may use the dropdown menu for your selections
Type	User defined	R	Will default in Navy MWR
Area	User defined	R	Will default in the area

Group	User defined	R	Enter the employee's group using the drop down menu to select. User MUST verify for accuracy. .
Level	Level of Pay	R	Will default based on the entry in the group field. User MUST verify for accuracy.
Hourly Rate **Wage types:** **1010 = Hourly rate**	Enter correct rates for each wage type listed	R	Enter the hourly rate(s) or have the rate(s) default if the annual salary field is populated. **Note: NA, NL, & NS groups will populate hourly rate. NF and CC wage rates must be entered.**
Annual Salary	Annual Salary	R	This field will default as no entry is allowed.
Capt util. Lvl	Used for Ansal calculation	R	The field defaults "100" Note: This field must NOT be changed.
Work/Hrs Period	Work hours in a period	R	This field will default in.

Press the Enter button [✓] or key to validate the entries. The system generates a

warning message. Click [✓] to acknowledge the message.

Save the transaction by clicking the Save icon. [💾]

Infotype 0008 is validated and the next screen Infotype 0019 – <u>Monitoring of Dates</u> is put into the action.

We have entered the Task Type, which was the "**Step Increase**" type of task, "**New Task**" defaults Processing indicator and entered some comments regarding when the next step increase is due. If no entry is required, "right arrow" through this screen. Press the

Enter button or key, and save the transaction. The Adjustment in basic pay action is complete. Follow the for printing and/or emailing PAR.

> NOTE: Enter the last day worked as the date of the action. The system
> will roll to the next date for the termination date. Enter information on
> remarks section of PAR.

✓ Process a NAF Employee Separation

This procedure documents the steps required to process an employee due for separation for any reason.

This action uses the copy mode for several infotypes. It is important that you remember that information that has defaulted in the fields pertains to a previous action and some fields may need to be changed to reflect the current action.

After you have entered your changes to an infotype and used the Enter key, you should receive a warning telling you that the previous record will be delimited. This verifies that you want to make the change and that you have changed the From date to reflect that your record will now be the current one. You may proceed through the message by using the Enter again and you will then be prompted to Save your record

Menu path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT >
ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

Field Name	Description	R/O/C	User Action/Values
Personnel Number	The system generated Personnel ID Number	R	Enter the personnel number, if known. Use the dropdown arrow to aid in the selection.
From date	The date the action is effective	R	Enter the last worked date. The date for separation will roll to the next day.
Action Type	The type of action that is to be performed	R	Select and highlight the Separation action.

Select the Execute icon .

The system will roll to Infotype 0000 – Copy Actions

Field Name	Description	R/O/C	User Action/Values
Action Type	Separation	R	This field will default in
Reason for Action	The reason the action is being performed	R	Use the drop down arrow to aid in the selection.
Employment	User defined	R	This field will default in with **"Withdrawn"**
Position	User defined	R	This field will default in – **Must be Blank** **For a transfer, must be "99999999"**
Personnel Area	The assigned area of the position within the organization	R	This field will default in

Employee Group	The group of employees that the individual has been assigned to	R	This field will default in **Must be changed to T-Separated. Use the dropdown arrow to select.**
Employee SubGroup	The assigned subgroup for the employee	R	This field will default in **Must be changed to TR-Separated. Use the dropdown arrow to select.**

Press the Enter

You will receive a message that the previous infotype will be delimited.

Press Enter again.

Save the transaction by pressing the Save icon .

The screen will roll to Infotype 0001 – <u>Copy Organizational Assignment.</u>

Field Name	Description	R/O/C	User Action and Values
Co Code	Company Code	R	This field will default in.
Pers Area	Personnel Area	R	This field will default in.
Cost Ctr	Cost Center	R	This field will default blank
Subarea	Personnel Subarea	R	This field will default in.
EE Group	Employee Group	R	This field will default in.
EE Subgroup	Employee Subgroup	R	This field will default in.
Payr Area	Payroll Area	R	This field will default in.
Position	Position number	R	This field will default in 999999.

All of the fields will default in. Validate the entries and Press the Enter key [icon]. You will receive the Record delimited warning again.

The Create Vacancy informational window will appear. Select the "Yes" button and Save the transaction. [icon]. If necessary, change the date on this window to the termination date.

The system will now show Infotype 0008 – <u>Display Basic Pay</u> as shown below:

Right arrow, using the next record icon, through the Display Basic Pay screen.

Depending on the infotypes already in the system for the individual being separated, there will be more infotypes exposed. Most of them will have the information already defaulted into the records. The process will be the same for all.

The system will now display infotype 0006 – <u>Create Addresses</u> subtype 6 – <u>Forwarding Address</u>. This screen must be completed for a separated employee.

Press the Enter key . Read the Record delimited warning message. Press the Enter key again . Validate the entries.

The system will now show infotype 0171 – <u>General Benefits Information</u>. There are no entries required for this infotype record but the dates must be verified and the infotype saved.

Save the transaction. [save icon]. Record will be created. The system will return to the Personnel Actions Screen.

IF THIS ACTION IS BEING USED AS PART OF AN ACTIVITY TRANSFER TO A NEW PAYROLL AREA:

       Terminate ONLY applicable benefits by following the procedure for Benefit Termination (see Chapter 5 Benefits p. 5-36). For example, if an employee is separating from Seattle to transfer to Jacksonville, KPS and Standard Dental will have to be terminated, but all other benefits should not be terminated.

✓ **Separation/Option B Retirement**

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT >
ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction code: PA40

Field Name	Description	R/O/C	User Action/Values
Personnel Number	EE number	R	Enter the number if known, or search using the drop down arrow
From	Date of action	R	Enter the last date of work. The day **after** this date will appear on the next infotype screen.
Select action type	Type of action that is to be performed	R	Select the Separation Action

Infotype 0000: Copy Actions

Field Name	Description	R/O/C	User Action and Values
Action Type	Separation	R	No entry required
Reason for Action	The reason for the action being performed	R	You can use the drop down and select the reason
Employment	System default	R	This field will default in **Withdrawn** status
Position	User defined	R	Blank out position number and enter 999999
Personnel Area	The assigned area of the position within the organization	R	This field will default in
Employee Group	The assigned group of employees the employee will be assigned to	R	This field will default in. **You must change the EE Group to T – Separated**
Employee Subgroup	The assigned subgroup for the employee	R	This field will default in. **You must change the EE Group to TR – Separated**

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the Enter icon [icon] again. You will be warned to save your entries.

Press the Save icon [icon]. You will now see the next infotype in the separation action series the Infotype 0001 – <u>Copy Organizational Assignment.</u>

Field Name	Description	R/O/C	User Action and Values
Co Code	Company Code	R	This field will default in.
Pers Area	Personnel Area	R	This field will default in.
Cost Ctr	Cost Center	R	This field will default blank
Subarea	Personnel Subarea	R	This field will default in.
EE Group	Employee Group	R	This field will default in.
EE Subgroup	Employee Subgroup	R	This field will default in.
Payr Area	Payroll Area	R	This field will default in.
Percentage	Percentage assigned	R	Must blank out
Position	Position number	R	This field will default in 999999.

Job Key	Job key	R	This field will default in.
Exempt	Exempt status	R	This field will default in.
Org Unit	Organization unit assigned	R	This field will default in.
Org Key	Organization key assigned	R	This field will default in.

Press the Enter icon ⊘. You will get the Record Delimited warning message. Press the Enter icon ⊘ again. You will be warned to save your entries.

Press the Save icon 🖫. The "Create Vacancy" box will appear. Select the "yes" option.

After selecting "yes" in this window, you will see the infotype <u>Display Basic Pay</u>. Select the next screen 📄 icon to "right arrow" through this screen.

You will now see the next infotype in the retirement action series the Infotype 0006 – <u>Create Addresses</u>, Subtype Forwarding Address.

Infotype 0006: Create Addresses

Field Name	Description	R/O/C	User Action and Values
Address Type	Type of address	R	This field will default **Forwarding Address**
C/O	In care of	O	This field may default in if a record already exists. If no data defaults, you may enter the c/o person's name.
Address	Street name and number	R	This field may default in if a record already exists. If no data defaults, you may enter the street address.
City	City	R	This field may default in if a record already exists. If no data defaults, you may enter the city.
State/Zip Code	State/zip code	R	This field may default in if a record already exists. If no data defaults, you may enter the state.

Country Key	Country	R	This field will default US. You may change if needed.
Telephone Number	Telephone	O	This field may default in if a record already exists. If no data defaults, you may enter the telephone number.
Communications	User defined	O	This field may default in if a record already exists. If no data defaults, you may enter additional contact numbers.

Select the Enter icon [icon]. You will be warned to save your entries.

Press the Save icon [icon].

You will now see the next infotype in the retirement action series the Infotype 0001 – <u>Retirement Plan Data at Termination</u>.

Infotype 0001 - Create Retirement Plan Data at Termination

Field Name	Description	R/O/C	User Action and Values
From	Date of Termination	R	The system enters the date of the termination. Leave the end date as 12-31-9999
Previous Participation in Plan	Y for previous plans N for no previous plans	R	Select Y if previous plan exists, in most cases no previous plan exists, so you would select N using the drop down arrow
If Yes, Retirement Plan Option		R	This must be "Y" for the Option B
If Discontinue Date		R	Must be blank for this termination

Press the Enter icon . You will get the message "Retirement plan option cleared."

Select the Enter icon . You will be warned to save your entries.

You will now see the infotype 0171 – Create General Benefits Information.

Infotype 0171 – Create General Benefits Information

Press the Save icon . You will get the Record Delimited warning message.

Select the Enter icon . You will get the message "record created." Select the Enter

icon again to close the information window.

✓

Process an Employee Retirement

This action uses the Copy mode for several infotypes. It is important that you remember the information that might default into the fields is from a previous action. Be very careful to verify this information and delete it if it does not pertain to the action that you are taking.
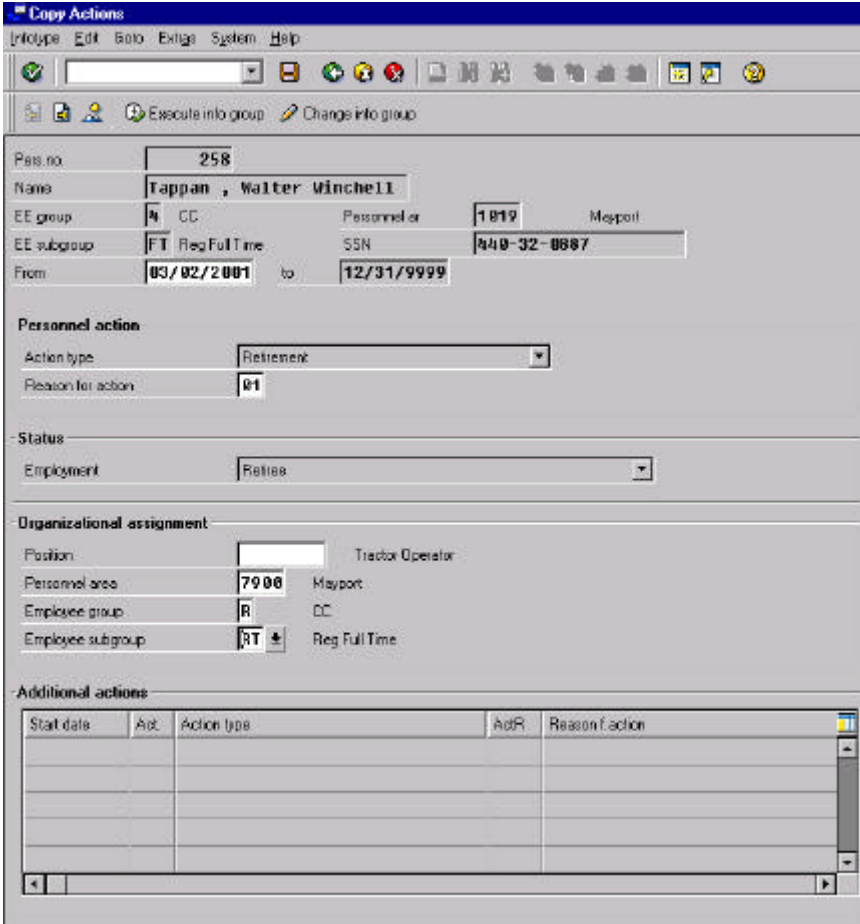
Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

Field Name	Description	R/O/C	User Action/Values
Personnel no.	The individual's personnel number in the system	R	Enter the employee's number if known or use the dropdown menu to select.
From date	The date the action is effective	R	Enter the employee's last day of work before the retirement
Action type	The type of action to be performed	R	Click on and highlight the Retirement action

Select the Execute Icon ⌖.

The screen will now show infotype 0000 – **Copy** Actions
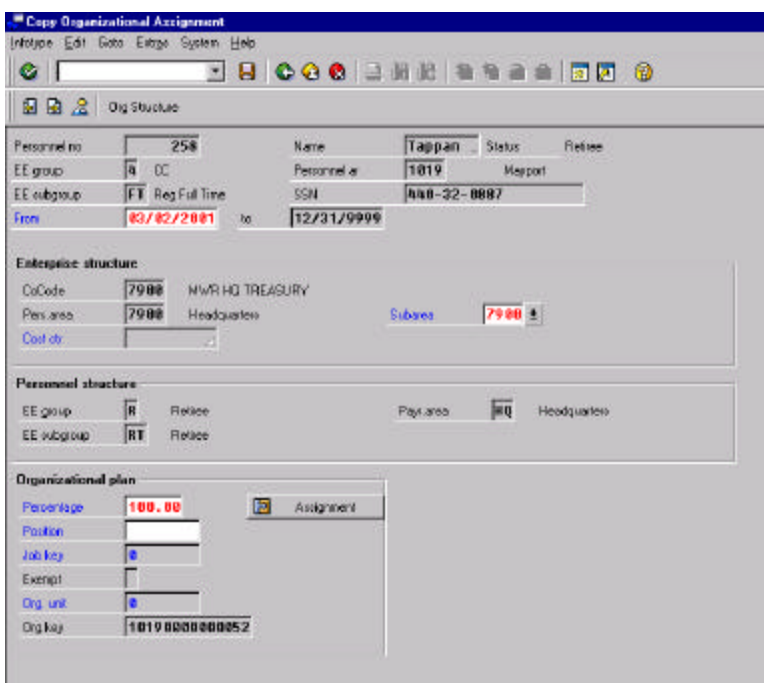
Field Name	Description	R/O/C	User Action/Values
Action type	Retirement	R	This will default in. No Entry required
Reason for Action	The reason the action is being performed	R	Use the dropdown arrow and select Retirement
Employment	User Defined	R	Field will default in.
Special payment	User Defined	R	Field will default in.
Position	User Defined	R	**Must be blanked**
Personnel Area	Location of the employee	R	**This will default in. No entry required**
Employee Group	The assigned group of employees that the individual belongs to.	R	**Use the dropdown menu to select Retiree**

Employee Subgroup	The assigned subgroup for the employee	R	**Use the dropdown menu to select the required Retiree**

Press the Enter button [icon]. You will receive the message " Previous record *date* to *date* will be delimited". Press the Enter button again. [icon]

Save the transaction [icon].

*Screen: Infotype 0001 – **Copy Organizational Assignment***

Field Name	Description	R/O/C	User Action/Values
Co Code	Company Code	R	Field will default in.
Pers Area	Personnel Area	R	Field will default in.
Cost Ctr	Cost Center	R	Will default blank
Subarea	Personnel SubArea	R	Will default
EE Group	Employee Group	R	Will default to **"Retiree" R**
EE Subgroup	Employee SubGroup	R	**Enter RT**
Payr Area	Payroll Area	R	Will default to **"HQ"**
Percentage	Percentage employee assigned to the position number	R	Field will default in.
Position	Position number	R	Will default blank
Job key	Job Key	R	Will default blank
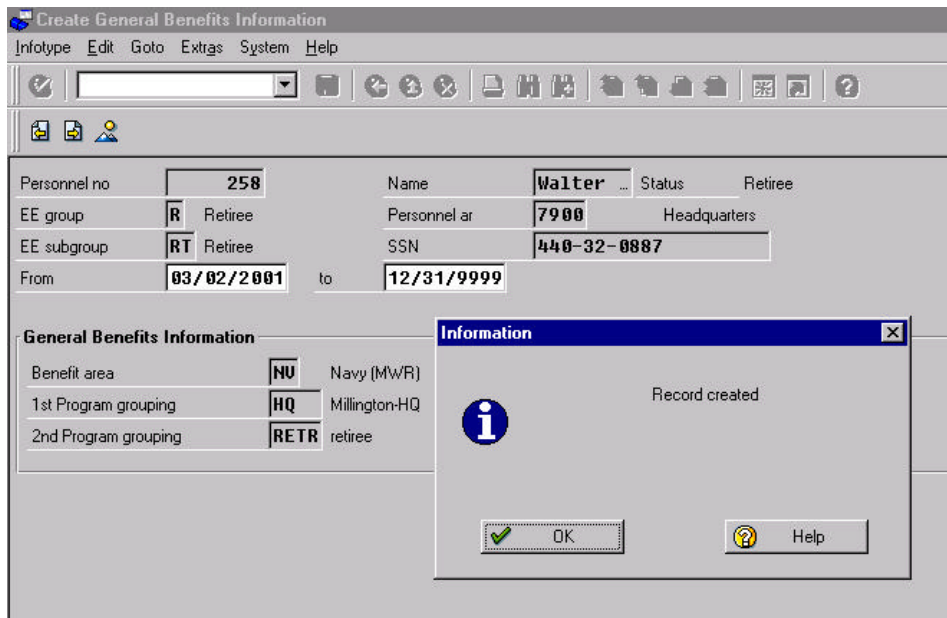
Exempt	Exempt status	R	Will default blank
Org Unit	Organization unit assigned	R	Will default blank
Org Key	Organization key assigned	R	Will default in.

Press the Enter button. [image] You may or may not receive a warning message stating that the record date to date will be delimited. Press the Enter button again. [image].

Save the transaction [image].

This will result in opening infotype 0171 – <u>Create General Benefits Information</u>

All required fields will default in. The information must be validated by pressing the Enter key [image] and then saving the transaction [image].

After pressing the Enter key and saving the transaction, you will receive the message that the Record has been created and the system will show the final infotype in this action. Infotype 0378 – Create Adjustment Reasons

After the retirement record has been created, you must email and print a PAR. Add sick and leave balances, then email PAR to payroll.

☑ Process a Leave of Absence (LWOP)

This process is only used when an employee is out of work <u>without</u> pay. This is a non-pay status and therefore when the employee is in this status, there is no accumulation of either sick or annual leave. This status is usually set due to the employee's request. See the policy manuals for further explanation of this process.

This action uses the copy mode for several infotypes. It is important that the user remembers that information that has defaulted in the fields pertains to a previous action and some fields may need to be changed to reflect the current action.

After you have entered your changes to an infotype and used the enter key, you should receive a warning message telling you that a previous entry has been delimited. This warning verifies that you actually want to make the change and that you have changed the "From date" to reflect that your record will now be the current one. You may proceed through the message by using the Enter key again and you will then be reminded to save your changes.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

Field Name	Description	R/O/C	User Action/Value
From date	The date the Leave of absence is to start	R	Enter the effective date of the action
Personnel Number	Employee Number	R	Enter the number or use the dropdown menu to select the correct employee
Action type	The type of action to be performed	R	Select the Leave of Absence action

Select the Execute icon

Save the transaction by clicking the icon

The result is that infotype 0000 – <u>Copy Actions</u> will appear.

Field Name	Description	R/O/C	User Action/Values	Comments
Action Type	Leave of Absence	R	This will default in	
Reason for action	The reason for the action being performed	R	You can use the dropdown menu to select the reason	**Only Field requiring entry**
Employment	Changed to inactive	R	This will default in	
Position	MWR Position	R	Will default the position number	
Personnel Area	The assigned area within the organization	R	The field populated from the previous record	
Employee Group	The assigned group the employee has been assigned to	R	The field populated from the previous record	
Employee Subgroup	The assigned subgroup for the employee	R	The field is populated from the previous record.	

Select the Enter icon .

Save the transaction by clicking the icon

The result is that infotype 0019 – Create Monitoring of Dates will appear.

Field Name	Description	R/O/C	User Action/Values
Task Type	Type of task to be monitored	R	Defaults to Leave of Absence. Nothing required
Date	Date that the task will require action	R	Field is required if the task type was populated. **Enter the expected return date.**
Processing indicator	Status of task	R	Defaults as "New Task" No entry required.
Comments	Comments	O	Free text if comments need to be entered.

Select the Enter icon .

Save the transaction by clicking the icon

Screen will roll back to the Personnel Action Screen and the Record will be created.

✓ **Process a Return from Leave of Absence**

This procedure should be used to process a return from a Leave without Pay (A Leave of Absence).

- This process uses the copy mode for several infotypes. It is important that you remember the information that has defaulted in the fields pertains to a previous action and some fields may need to be changed to reflect the current action.

- After you have entered your changes to an infotype and used the enter key, you should receive a message telling you that a previous entry will be delimited. This verifies that you want to make the change and that you have changed the From Date to reflect that your changed record will now be the current one. You will proceed through the message by using the Enter key and you will then be prompted to save your changes.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

We have selected Personnel Number 744 and highlighted the **Return from Leave of Absence** action type.

Select the Execute icon

Field Name	Description	R/O/C	User Action/Values
Action type	Return from Leave of Absence	R	Will default in
Reason for Action	The reason the action is being performed	R	Use the drop down arrow to select the reason. **This is the only field that requires an entry**.
Employment	User defined	R	Will default in
Position	User defined	R	Will default in
Personnel Area	User defined	R	Will default in
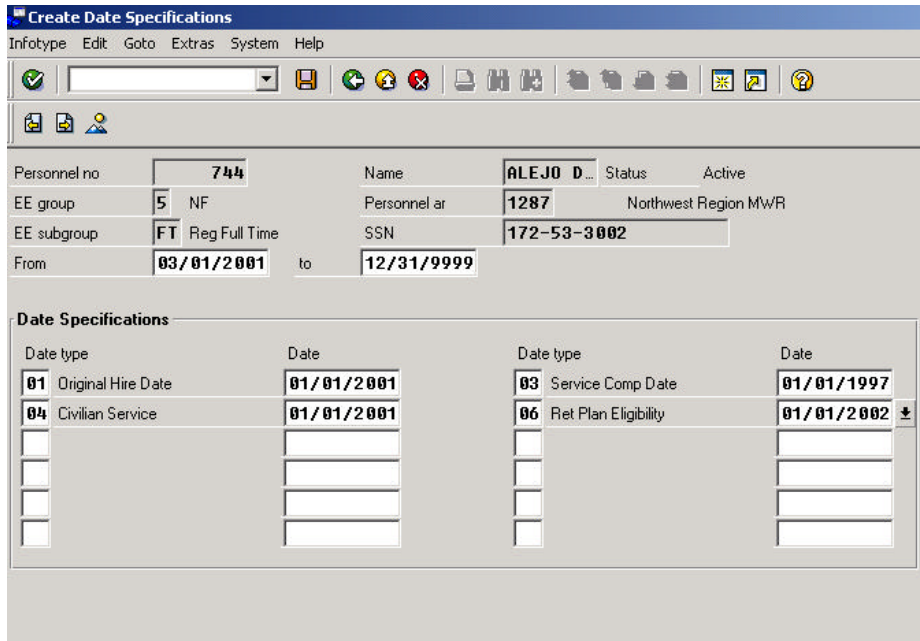
Employee Group	The group that the employee is assigned to.	R	Will default in
Employee subgroup	The assigned subgroup for the employee	R	Will default in

Press the Enter button [icon]. A message "W: Record valid date to date will be delimited". Press the Enter button again.

Save the transaction (Select the Save icon [icon]).

The next infotype appears Infotype 0041 – <u>Create Date Specifications</u>
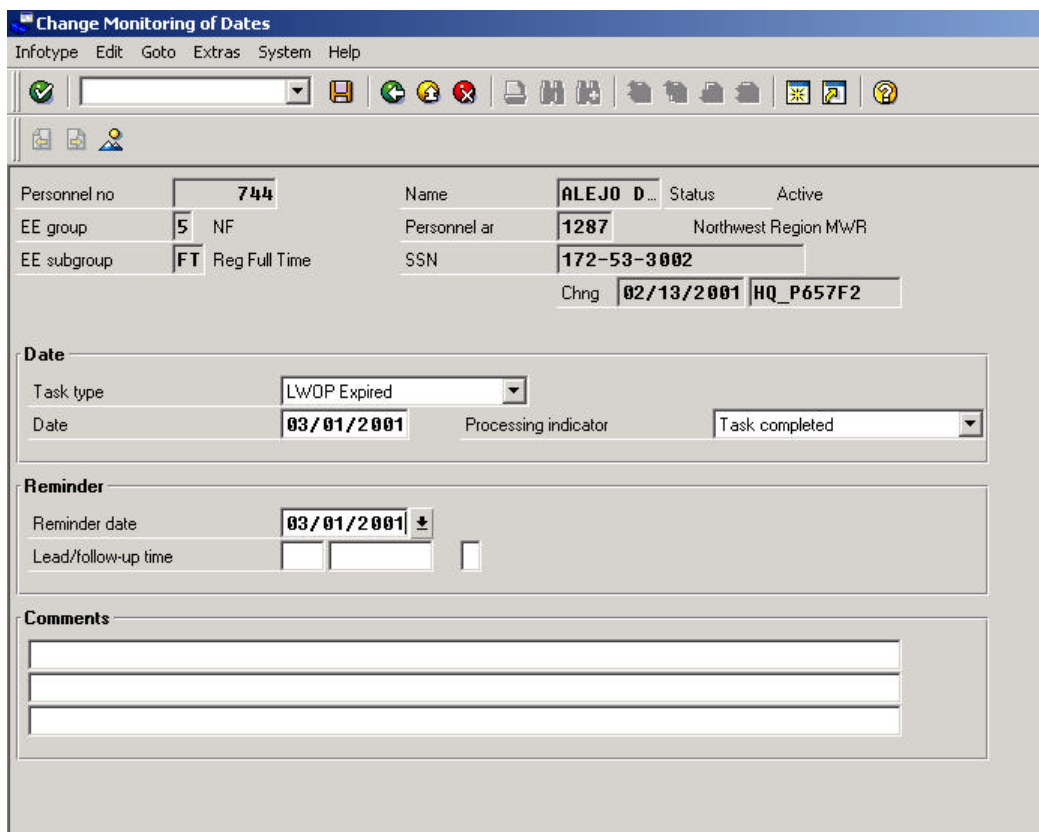
> **NOTE**: This screen is only necessary if the Leave of Absence should change the Service computation date. If not move through the record screens using the next and previous record icons as shown. [icons].

If any changes were made, Press the Enter button [icon].

Save the transaction using the Save icon [icon].

The screen rolls to infotype 0019 – <u>Change Monitoring of Dates</u>

Field Name	Description	R/O/C	User Action/Values
Task Type	Type of task to be monitored	R	Defaults as Leave of Absence.
Date	Date that the task will required action	R	Defaults as the date entered in the Leave action (the expected date of return) **No entry required**.
Processing indicator	Status of task	R	From drop down arrow, select **Task completed**.
Comments	Comments	O	Free text for any comments.

Press the Enter button, Save the Transaction and the Record will be created.

✅ Process an External Hire

Do this when it becomes necessary to place a new GS/WG APF funded employee, a Military Assigned Employee or an employee of a civilian recreation find or similar NAFI into our Human Resources system. Only certain key elements will be captured for these employees. The procedure as shown below will explain to the user how this is to be accomplished. These employees will **NOT** be paid through the ADP payroll processing system. This information is for record keeping and reporting purposes only. It will be necessary for the NAF personnel office to obtain a copy of the current and all subsequent SF-50s from the Appropriated Funds Human Resource Office (HRO) to perform this input and to keep it current. In addition, certain information for a Military Assigned person will also be crucial to keeping our HR system up to date. To save time later in the procedure, have the position number available before you start.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

Field Name	Description	R/O/C	User Action/Values
Personnel Number	Leave blank	C	If the is a number in the field, **Blank it out!** The system will generate the new number.
From date	Hire Date	R	Enter the external hire date
Action type	The types of action that can be performed	R	Highlight the External New Hire action type

Select the execute icon [icon].

The screen will roll to infotype 0000 – <u>Create actions</u>

Field Name	Description	R/O/C	User Action/Values
Action type	External Hire	R	Will default from previous screen
Reason for action	Why is the action being performed	R	Select the appropriate code using the dropdown arrow 01 – GS/WG 02 – Civ NAFI 03 – Military Assigned

Employment	User defined	R	The field will default "Inactive" no entry can be made
Position	Enter the new position	O	You may enter the position, if known or select from the drop down arrow. **See the table on the next page for the position numbers for Military Assigned personnel.**
Click on the Green Check mark ⊘ or the Enter key to validate personnel areas			
Personnel area	The assigned area of the position within the organization	R	Will default in from the position number selected and will represent the entity (location) to which the position has been assigned.
Employee group	The assigned group of employees the employee will be assigned to	R	Will default to E for external and will represent the employee's employment category, i.e. NF, NA, GS(E), etc.
Employee subgroup	The assigned subgroup for the employee	R	This field will default based on position number. If military assigned, default entry is MA, GS for GS.

Table: SAP Position Numbers for Military Assigned Personnel

Military Assigned Personnel		
PSA	**Location**	**SAP Position number**
1019	Mayport	99999998
1034	Jacksonville	99999997
1171	QOLSO, NW	99999996
1173	N. Sound	99999995
1174	E. Sound	99999994
1287	W. Sound	99999993
1292	Kings Bay	99999992
7900	Headquarters	99999991
8019	VQ – Mayport	99999990
8034	VQ – Jacksonville	99999989
8172	VQ – NW	99999988
8292	VQ – Kings Bay	99999987

Press the Enter button [icon] to validate the fields on the screen and then press the Save

icon [icon] to save the transaction.

The result of saving the infotype is that the screen will now show the next applicable infotype 0002 – <u>Create Personal data</u>

	NOTE: According to the United States Postal Service Sorting Facility all names and addresses must be entered into the system using upper case letters and NO punctuation except the hyphen between the first five numbers in a Zip code and the last four.

Field Name	Description	R/O/C	User Action/Values
Form of address		O	You may enter the employee's form of address, i.e. Mr. Ms, Miss, etc. It will be validated in the gender field
Last Name	Last Name	R	Enter the last name (**All Upper Case**)
First Name	First Name	R	Enter the first name. (**All Upper Case**)

Middle Name	Middle Name	R	Enter the full middle name (per DOD instructions). (**All Upper Case**) If unknown, enter "NMN". If the employee only has an initial, enter that.
Designation		O	Employee's military rank. Is required for **Military Assigned** employees.
Suffix		O	If you wish, you may enter the employee's aristocratic title, i.e. JR, III, SR.
SSN	Social Security Number	R	Enter the number with or without dashes.
Date of Birth	Employee's date of birth	R	Enter the DOB in either of these two forms: 120161 or 12/01/1961
Comm. Lang	The language in which the employee prefers to communicate.	O	Field will default English. It may be changed.
Mar. Status	Marital status	R	Enter the marital status directly or use the dropdown arrow to select
Gender	Gender	R	Enter the employee's gender. TBD cannot be used according to DOD regulations.

Press the Enter button [icon] to validate the fields on the screen and then press the Save

icon [icon] to save the transaction.

The result of saving the infotype is that the screen will now show the next applicable infotype 0001 – Create Organizational Assignment

Field Name	Description	R/O/C	User Action/Values
CoCode	Company Code	R	Will default based on the position
Pers Area	Personnel Area	R	Will default based on the input to infotype 0000 action.
Cost Ctr	Cost Center	R	Will default
Subarea	Personnel subarea	R	Will default based on the input to infotype 0000 action.
EE Group	Employee Group	R	Will default based on the input to infotype 0000 action.
EE SubGroup	Employee SubGroup	R	Will default based on the input to infotype 0000 action.
Payr Area	Payroll Area	R	The field will default in
Percentage	Percentage of the employee's time assigned to the position number	R	The field will default in

Position	Position number	R	Defaults the position number. It should be on the new hire paper form or determined prior to the hiring action being executed.
Job Key	Job Key	R	Will default based on the input to infotype 0000 action. It represents the pay plan, job series and grade/level.
Org Unit	Organization unit assigned	R	Will default based on the input to infotype 0000 action. The field represents the department the position reports to.
Org key	Organization key assigned	R	Will default based on the input to infotype 0000 action.

Press the Enter button to validate the fields on the screen and then press the Save icon to save the transaction.

Note: If hiring a military assigned person, you will receive the following warning message. Select to close the message window. Save the next screen "Integration Relationships."

The next screen will show the next applicable infotype 0006 – <u>Create Addresses</u>

NOTE: According to the United States Postal Service Sorting Facility all names and addresses must be entered into the system using upper case letters and NO punctuation except the hyphen between the first five numbers in a Zip code and the last four.

After making the entries required, Press the Enter button [icon] to validate the fields on the screen and then press the Save icon [icon] to save the transaction.

The result of saving the infotype is that the screen will now show the next applicable infotype 0007– <u>Create Planned Working Time</u>

The Work Schedule rule field will default to EXT- External Schedule.

No entries are required but check that the Employment percent is 100%. Press the Enter
button to validate the fields on the screen and then press the Save icon to save
the transaction.

The result of saving the infotype is that the screen will now show the next applicable infotype 0008 – Create Basic Pay

Field Name	Description	R/O/C	User Action/Value
Reason	Reason for the action with this infotype	R	**Use the drop down arrow to make your selection**
Type	User defined	R	Field will default in
Area	User defined	R	Field will default in
Group	User defined	R	Enter the employee's grade. Use the dropdown arrow for your selection. (Example: MA 00 for military assigned)
Level	Level of Pay	R	Will default based on the entry in the Group field.
Hourly Rate	Enter the correct rates for each of the types listed	O	**Enter if available, if not leave blank**

After making the entries required, Press the Enter button [icon] to validate the fields on the screen and then press the Save icon [icon] to save the transaction.

The result of saving the infotype is that the screen will now show the next applicable infotype 9001 – <u>Create DOD/MWR Specific Data</u>

Field Name	Description	R/O/C	User Action/Values
Person Hispanic Category Code	Is this person Hispanic?	R	Use the drop down menu to complete the selection
Bargaining Unit Eligibility Code	Bargaining Unit code	R	Use the drop down menu to complete the selection
Retirement Plan Code	Which retirement system?	R	Use the drop down menu to complete the selection
Retirement Certificate Number	Retirement Plan Certificate Number	O	Field is maintained at the Headquarters level.
Savings Plan	What savings plan was elected?	R	Use the drop down menu to complete the selection
Portability of Retirement election	Is the Retirement plan portable?	R	Use the drop down menu to complete the selection
Portability of Benefits Status Code	Benefits Portable?	R	Use the drop down menu to complete the selection
Position Sensitivity	Position sensitive?	R	Use the drop down menu to complete the selection
Supervisor Position	Supervisory position?	R	Use the drop down menu to complete the selection
Misc Notes		O	Enter information as free text that relates to Drawing NAF retirement and the NAF retirement #

After making the entries required, Press the Enter button [icon] to validate the fields on the screen and then press the Save icon [icon] to save the transaction.

The result of saving the infotype is that the screen will now show the next applicable infotype 0077 – <u>Create Additional Personal Data</u>

Field Name	Description	R/O/C	User Action/Values
Ethnic Origin	Will coincide with the DOD listing	R	Use the drop down menu to complete your selection
Military Status	Either veteran or non-veteran	R	Use the drop down menu to complete your selection

After making the entries required, Press the Enter button [icon] to validate the fields on the screen and then press the Save icon [icon] to save the transaction.

The result of saving the infotype is that the screen will now show the next applicable infotype 0041 – Create Date Specifications

All of the fields as shown on this infotype are optional and there is no need to maintain this infotype for External employees.

Press the Enter button to validate the fields that are defaulted on the screen and then press the Save icon to save the transaction.

The key master data is captured on the external employee and the External Hire is complete. The employee has been given a SAP Personnel ID Number and the employee information can be accessed in the system.

✓ **Process an External Change of Position**

Do this when it becomes necessary to move a GS/WG APF funded employee, a Military Assigned Employee or an employee of certain Civilian NAFIs into a new position within MWR. Only certain key elements will have been captured for these employees. The procedure as shown below will explain to the user how this is to be accomplished.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

Field Name	Description	R/O/C	User Action/Values/Comments
Personnel Number	Employee Number	R	Either enter the personnel number or use the drop down arrow to select.
From	The From date of the action	R	Date of the Position change
Action type	The type of action to carry out	R	Highlight the External change in Position

Click on the Execute icon ⊕ on the applications toolbar.

Screen: Infotype 0000 Copy Actions

Use the table below to make the required changes and additions to the Infotype 0000 – Copy Actions.

Field Name	Description	R/O/C	User Action/Values/Comments
Action Type	The type of action	R	Field will default in "External change of Position"
Reason for action		R	Enter the reason using the drop down arrow to aid in the selection.
Employment		R	Will default to "Inactive" and will not be available to change

Position	In the Organizational Assignment section	R	Must be blanked out. The correct entry must replace the existing entry. Use the drop down arrow to select the new position number Click the Green check mark or press the enter key to validate the other entries in this section
Personnel Area		R	This will default from the previous position. **Blank it out! This will now default from the new position upon pressing the Enter key.**
Employee Group		R	This should default to External
Employee Subgroup		R	This will default from the previous position and should be one of the External subgroups. Use the drop down arrow to select if not defaulted.

Press the Enter icon [icon] to validate entries. You may or may not receive a warning message stating that the previous record will be delimited (e.g., the end date of the last action will now be populate with the From date of the new action.)

Save the transaction by clicking on the Save icon [icon] .

The screen below shows the infotype after the changes have been made:

NOTE: No entries are required on this infotype. Look over the fields and press the enter key to validate.

A pop-up box will appear to create a vacancy for the External employee's previous position. Click on "Yes"

Save the transaction by clicking on the Save icon.

Any other information on an external employee will be maintained through the Maintain Master Data – Transaction PA30.

✓ Process an External Separation

Do this when it becomes necessary to remove a GS/WG APF funded employee, a Military Assigned Employee or an employee from a Civilian NAFI from our Human Resources system. Only certain key elements will have been captured for these employees. The procedure as shown below will explain to the user how this is to be accomplished.

These employees are **NOT** being paid through the ADP Payroll processing system. This information has been kept for record keeping and reporting purposes only. It will be necessary for the NAF personnel office to obtain a copy of the current and all subsequent SF-50s from the Appropriated Funds Human Resource Office (HRO) to perform this input and to keep it current. In addition, certain information for a Military Assigned person will also be crucial to keeping our HR system up to date.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

In the example above, we have selected Personnel number 761, an employee who is being separated for health reasons.

We have highlighted the line on the Action Types section for External Separation.

We now click the Execute icon

This will expose the infotype 0000 – <u>Copy Actions</u>

Field Name	Description	R/O/C	User Action/Values
From date	Date of action	R	Use date of action
Action Type	External Separation	R	Will default in from the action type
Reason for Action	The reason for the event to be performed	R	Use the drop down menu to select the reason. 01 = Voluntary. Only one reason code was set up for termination because MWR doesn't track this.
Employment	User defined	R	This field will default "withdrawn"
Position	User defined	R	**Make this field blank**.
Personnel Area	The assigned area of the position within the organization	R	This field will default in
Employee Group	The assigned group of employees the employee has been assigned to.	R	Field will default. **You MUST change the Employee Group. Use the dropdown menu to select the correct entry which is "T" for Separated.**
Employee Subgroup	The subgroup that the employee has been assigned to	R	Field will default. **You MUST change the Employee Subgroup. Use the dropdown menu to select "TR" for Terminated.**

Press the Enter button ![Enter button] to validate the fields that are defaulted on the screen and then press the Save icon ![Save icon] to save the transaction.

The following screen will pop up to ask if you wish to create a vacancy for the position.

Click "Yes."

The system will now expose infotype 0001 – <u>Copy Organizational Assignment</u>

Field Name	Description	R/O/C	User Action/Values
Co Code	Company Code	R	This field will default in
Pers Area	Personnel Area	R	This field will default in
Cost Ctr	Cost Center	R	This field will default blank.
Subarea	Personnel SubArea	R	This field will default in
EE Group	Employee Group	R	This field will default in
EE Subgroup	Employee subgroup	R	This field will default with **T-Separated**
Payr Area	Payroll Area	R	This field will default with **TR-Terminated**
Position	Position number	R	This field will default in.
Job Key	Job Key	R	This field will default blank
Exempt	Exempt Status	R	This field will default blank
Org Unit	Organizational Unit assigned	R	This field will default blank
Org key	Organization key assigned	R	This field will default in

Note: No entry is required for the above screen.

Press the Enter key ⊘ .
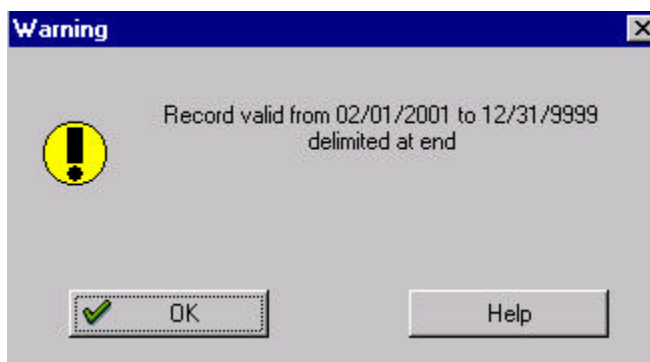
Warning [X]

⚠ Record valid from 02/01/2001 to 12/31/9999
delimited at end

✔ OK   Help

After you have entered your changes to an infotype and used the enter key, you should receive a warning message (shown above) telling you that a previous entry will be delimited. This verifies that you want to make the change and that you have changed the From date to reflect your record and that will now be the current record. You may proceed through the enter key and you will then be prompted to save your changes.

Press the Save icon [icon] to save the transaction.

The window will now display the infotype 0008 – Basic Pay. This infotype will only appear if the external employee has a basic pay record originally created.

The screen is for Display purposes only and you may Green Arrow through it.

The Record has been created and the External Employee has been separated in the system.

✓ Process an External Rehire

A GS, Civilian NAF, or Military Assigned EE is to be rehired. Only key elements are to be captured for these employees.

Create or search for position number before starting this action. Search for existing personnel number in the system.

When hiring a Military Assigned employee enter #99999999 for the position number. This is a special number set up just for MA's.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

Action type	Personnel ar	EE group	EE subgroup
Cash Award / Lump Sum Payment			
Activity Transfer			
Option B Resignation			
Vested NAF to GS			
External Rehire			
External Change in Position			

Enter personnel number and hit enter. Highlight External Rehire action.

Press the Execute icon [icon] and the Infotype 0000 - Copy Actions screen is shown.

We will make various changes to this screen and they are reflected in the screen shot above. We will validate the changes before we save the record. Here are the inputs that we have used.

Field Name	Description	R/O/C	User Action/Values
Action type	Rehire	R	Will default in
Reason for action	The reason the action is being performed	R	You may enter the action directly or use the dropdown menu to select.
Employment	User defined	R	Field will default in Active
Position	User defined	R	Clear this field.
Personnel Area	The assigned area of the position within the organization	R	**Clear the field before selecting Will default from the position number selected**
Employee Group	The group that the employee will be assigned to	R	**Clear the field before selecting Will default from the position number selected**
Employee Subgroup	The assigned subgroup for the employee	R	**Clear the field before selecting Use drop down arrow to select.**

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the

Enter icon [icon] again. You will be warned to save your entries.

Press the Save icon [icon].

You will now see the next infotype in the rehire action series the Infotype 0002 – **Copy Personal Data**

We have made no changes to infotype record so we validate the entries and save the

record by clicking on the Save icon [icon].

If there are any changes to any of these infotypes, make the changes and/or additions. If there are none and the information as stated on the infotype remains the same:

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the

Enter icon [icon] again. You will be warned to save your entries.

Press the Save icon [icon].

The next infotype is 0001 – **Copy Organizational Assignment** as shown below.

Validate all the entries on the screen and then: Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the Enter icon [icon] again. You will be warned to Save your entries.

Press the Save icon [icon].

As you go through the infotypes during the rehire process, validate the entries for accuracy, make the changes and/or additions as needed and:

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the Enter icon [icon] again. You will be warned to Save your entries.

Press the Save icon [icon].

The next infotype 0006 – Copy Addresses appears.

Again, there have been no changes in this information so we follow the same steps as before.

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the Enter icon [icon] again. You will be warned to save your entries.

Press the Save icon [icon].

The next screen to appear is the Tax Area. Always select the state of residence on this pop up window.

Double click on state name or click once, then select the green check [icon]. This populates the tax area field on the next screen, Create Residence Tax Area.

Press the Enter icon ![icon]. You will get the Record Delimited warning message. Press the
Enter icon ![icon] again. You will be warned to Save your entries.

Press the Save icon ![icon].

Press the Enter icon ![enter icon]. You will get the Record Delimited warning message. Press the

Enter icon ![enter icon] again. You will be warned to Save your entries.

Press the Save icon ![save icon].

We have received a new W4 from the rehired employee and must make the changes to infotype 0210 – <u>Withholding Info W4/W5 US</u> . In this case it is for the Federal Withholding as indicated on the screen.

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the Enter icon [icon] again. You will be warned to Save your entries.

Press the Save icon [icon].

The next infotype in the process of rehiring an employee appears on the next page.

This infotype 0041 – <u>Copy Date Specifications</u> shows the rehire date, requires no entry but must be saved.

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the

Enter icon [icon] again. You will be warned to Save your entries.

Press the Save icon [icon].

The next infotype is <u>Create Addresses – Unpaid Compensation.</u>

After making entries, press the Enter icon to validate. You will be warned to Save your entries.

Press the Save icon .

Validate entries by selecting , and save this screen.

The next screen is Copy Residence Status.

Press the Enter icon ⊘. You will get the Record Delimited warning message. Press the Enter icon ⊘ again. You will be warned to Save your entries.

Press the Save icon 🖫.

The next screen is Create Education. If no entries are necessary, click the ▣ icon. If education data is available, make entries in all required fields, and save your entries.

The next infotype to appear is the mandated DOD/MWR information type.

This is infotype 9001 – DOD/MWR Specific Data The completed infotype is shown on the next page.

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the Enter icon [icon] again. You will be warned to Save your entries.

Press the Save icon [icon].

The next infotype in the process 0007 – <u>Copy Planned Working Time</u> appears

The only entry required was to pick the Work Schedule Rule. In the example it was **2002 – NF REG 30**

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the Enter icon [icon] again. You will be warned to Save your entries.

Press the Save icon [icon].

We have filled in the fields required on this infotype 0008 – <u>Create Basic Pay</u>
We entered the group, the level and the hourly rate of pay.

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the
Enter icon [icon] again. You will be warned to Save your entries.

Press the Save icon [icon].

The next screen to appear is <u>Create General Benefits Information.</u>

This is another infotype 0171 – <u>Create General Benefits Information</u> that requires no entry, just validation of the information and saving it.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to Save your entries.

Press the Save icon .

The final infotype to appear in the rehire process is infotype 0378 – Create Adjustment Reasons. This screen is shown here.

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the Enter icon [icon] again. You will be warned to Save your entries.

Press the Save icon [icon].

The process is complete and this can be verified by using transaction code PA30 to inspect all the infotypes processed during the rehire.

Print a Personnel Action Report, and continue processing rehire with Creating Benefit Enrollment.

 Process an Activity Transfer

NOTE: PERSON TO PROCESS ACTIVITY TRANSFER MUST LOG ON AS PA40. CONTACT PERSONNEL MANAGER OR CALL HELPDESK FOR ASSISTANCE.

When an employee transfers from one activity to another, the process requires three steps. The first step is **Employee Separation** from the employer of origin, or where the employee is transferring from. That location must initiate the process by completing the **Employee Separation** for the transferring employee.

The new location, where the employee is transferring to, must complete the transfer process with the next two steps, **Activity Transfer** and **Change in Position**.

These three steps cannot be completed by the same location. The location of origin must initiate the process, with the location of destination completing the process.

Summarized as follows:

What to do	Who completes it	Where to find it
Employee Separation	Personnel Dept at base employee is transferring **FROM**	Chapter 4 of this manual Page 4-52
Activity Transfer	Personnel Dept at base where employee is transferring **TO**	See procedure below for menu path and transaction codes
Change in Position	Personnel Dept at location where employee is transferring **TO**	Follows Activity Transfer procedure Page 4-117

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction code: **PA40**

Personnel Actions

Field Name	Description	R/O/C	User Actions and Values
Personnel Number	Original number	R	Use employee personnel number
From	Date after separation date	R	Enter date of action (day after separation date)

Select "**Activity Transfer**" and then select the ⏰ icon.

Field Name	Description	R/O/C	User Action and Values
Action Type	Activity Transfer	R	This field will default in
Reason for Action	The reason for the action being performed	R	Enter 01 - Transfer
Employment	User defined	R	This field will default to Active
Position	User defined	R	You can enter 99999999. Field must with completed with all "9" (**New position number will be entered in the next process Change in Position**)
Personnel Area	The assigned area of the position within the organization	R	Enter the personnel area for the new location.
Employee Group	The assigned group of employees the employee will be assigned to	R	Change the employee group to "1" for NA always, use drop down arrow

| Employee Subgroup	The assigned subgroup for the employee	R	Change the employee subgroup to Regular Full Time always (use drop down arrow)

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the Enter icon [icon] again. You will be warned to Save your entries.

Press the Save icon [icon].

Field Name	Description	R/O/C	User Action and Values
Co Code	Company Code	R	This field will default in.
Cost Ctr	Cost Center	R	Field is grayed out
Subarea	Personnel Subarea	R	Subarea must be entered, use drop down arrow if necessary
EE Group	Employee Group	R	This field will default in.

EE Subgroup	Employee Subgroup	R	This field will default in.
Payr Area	Payroll Area	R	This field will default in.
Percentage	Percentage employee assigned to the position number	R	This field will default in.
Position	Position number	R	This field will default in.
Job Key	Job key	R	This field will default in.
Exempt	Exempt status	R	This field will default in.
Org Unit	Organization unit assigned	R	This field will default in.
Org Key	Organization key assigned	R	This field will default in.
Pers Area	Personnel Area	R	This field will default in.

Press the Enter icon ![ ]. You will get the Record Delimited warning message. Press the Enter icon ![ ] again. You will be warned to Save your entries.

Press the Save icon ![ ].

Select the "State of Delimitation" by clicking once, then click the "Delimit" button. At this point, the activity transfer is complete. You may now proceed with the Change in Position.

✓ Process a Change in Position

This procedure describes the steps necessary to process a change in position for a transfer through the SAP Human Resources system. For transfer of an employee within an activity, see Change in Position on page 4-25.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

Enter the personnel number from the employee's 52. The "From" date will be the same date as the Activity Transfer.
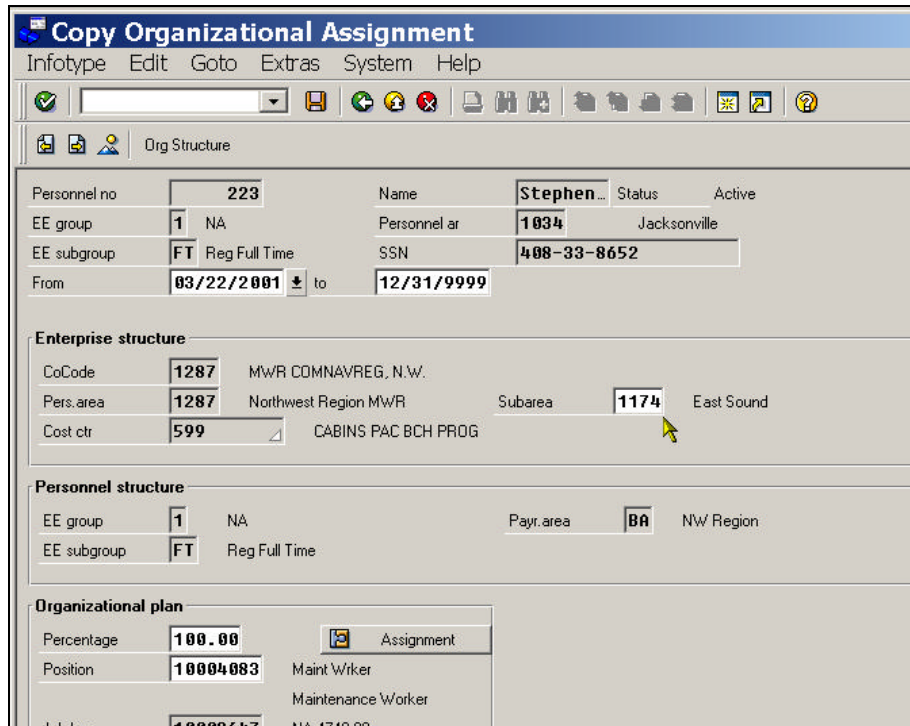
Field Name	Description	R/O/C	User Action/Values/Comments
Action type	Action type	R	Will default "**Change in Position**"
Reason for Action	The reason why the action is being taken	R	Using the drop down arrow select **11 – Payroll Area Transfer for records to transmit to ADP for payroll. No other reason will transmit.**
Employment	In the Status section	R	Will default to Active and it is not available for editing
Position	The current position number	R	**Must be blanked out!** The new position number may be entered directly, if known or use the drop down arrow to aid in the selection.
Personnel Area	The assigned area of the position within the organization	R	**Clear the field before entering**
Employee Group	The group that the employee will be assigned to	R	**Clear the field before entering**
Employee Subgroup	The assigned subgroup for the employee	R	**Clear the field before entering**

Hit ![icon] to populate the rest of the fields. Most of the fields will default from previous employee records. We highlight changes specific to employee transfers on the next pages.

You must enter the subarea on this screen. Percentage will default to 100%.

Press the Enter icon [icon]. You will get the Record Delimited warning message. Press the Enter icon [icon] again. You will be warned to Save your entries.

The next screen is the "Copy Addresses" screen.

. If the address information for the employee has changed, change the information. If not, use the next record icon to forward to the next screen. The same applies to all of the

tax infotypes as well. if the address changes, change the tax infotypes. If not, through the records so the data will not be changed.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to Save your entries.

The Delimit Work Tax Area screen will appear. When you get to this screen, select PREVIOUS state of residence. Click on delimit button. This saves the transaction.

Continue through all screens making changes or validating fields, saving entries as you go. When you get to the screen "Copy Planned Working Time," see next page for instructions.

Enter the "Work Schedule Rule" from the employee's 52.

Press the Enter icon [icon]. You will be warned to Save your entries.

Continue through all screens making changes or validating fields, saving entries as you go. When you get to the screen "Personnel Actions" the Change in Position is complete.

Enroll employee in applicable benefits using the Benefit Enrollment process.